

APPENDIX G

LISD Staff Focus Groups and Interviews Summary

The April 2001 Montana State Library web page describes the Library and Information Services Department (LISD) as “the ‘library’ component of the Montana State Library... (it) serves the work-related information needs of state government employees, provides backup reference assistance to librarians throughout the state, and provides public access to state publications for Montana citizens.” Prior to 2000 the department served in a more generalized role as back up to libraries in the state and as a library for the government employees in Helena who chose to come to it.

In early 2000 the department was reorganized and its primary focus narrowed to emphasize service to state government employees as in the web page description. The consultants were asked to review the department’s five goals and to give a brief progress report on the achievement of those goals since the reorganization. The consultants spent one day conducting a staff focus group and interviewing supervisors and users. A total of ten people talked with the consultants specifically about LISD. During the focus groups held with librarians and trustees throughout the state the participants were also queried briefly on their use of LISD services.

Current Goals:

Goal 1:

An easy to use web interface provides clients with reliable access to pertinent, up-to-date resources of the state library and other agency libraries, including, books, journals, state documents, federal documents, reference databases, and specialty online journals and bibliographic databases.

Goal 2:

In 2002, state employees throughout Montana are familiar with and value the services of the Library and Information Services Department.

Goal 3:

Urgent requests receive priority attention and are handled within required timeframes.

Goal 4:

Librarians are readily available by telephone or at the Library and assist clients to define questions, use resources, and develop strategies for finding answers in unfamiliar topic areas.

Goal 5:

State employees use the department’s web-site and their email software to register, request loans, photocopies, current awareness services, literature searches, and document retrieval, and to schedule training or consulting services.

Findings:

It is too soon to tell how successful the reorganization of LISD will be; much of the progress so far seems to be related to positioning the department to serve the needs of state employees more effectively. The consultants believe that this is a necessary step in achieving the overarching goal of making the state library "the first place state employees go for information."

Many of the current goals are, understandably, process oriented. They speak more to creating the frameworks necessary to provide services than they do to the outcomes that state employees will derive from using the services. Although a considerable amount of work remains to be done, it is clear that a great deal of progress has been made in establishing these frameworks.

In the future, goals need to move away from the process orientation and toward a focus on users and the benefits that they will receive. The State Library has set forth an ambitious task and, while staff generally seem to be accepting of the new direction that LISD is taking, there is considerable concern as to whether the library has, or will receive, the resources it will need to effectively serve a large percentage of state employees. The Client Services Supervisor seems to have a clear vision of the role that LISD can play. It is a vision that sees the state library functioning much like a special library in a large corporate setting. This direction appears to be entirely appropriate.

However, the new vision is a considerable departure from the model of library service that has prevailed in the past. In fact, it is hard to characterize the activity of the state library in the past as a model at all. Rather, the library followed several models in delivering a variety of services to different service populations. The library acted as a public library for some state employees and individuals living in the immediate area; the library followed a special library model in delivering services to state employees accessing the library for work purposes; and finally, the library acted as a reference referral center for libraries in the state. Of these three roles or models, acting as a public library seems least appropriate. Both the reference referral activity and serving as a special library for state employees appear to be legitimate functions of a state library.

The Montana State Library is making notable progress in moving toward the special library model. There is less clarity as to the role the state library will play long-term in the reference referral arena. A number of LISD staff members expressed concerns related either to being overwhelmed if the special library model catches on and/or feeling that the public libraries of the state will not receive adequate back-up reference service.

Current LISD goals focus on creating the framework to serve state employees. Greater clarity is probably needed in describing the LISD's role as it relates to referred reference, and, if that role is limited, how local libraries should deal with reference queries that require resources or skills not available locally.

There are several areas that the Montana State Library may wish to address in the development of future goals for LISD. They are:

1. Clarification and further development of the relationships between LISD and other departmental libraries within Montana State Government.
2. The identification of specific target audiences within state government (the departments or categories of employees that LISD can serve most effectively). These targeted audiences should then be addressed in a marketing plan.
3. Clarification and enhancement of the LISD's role in regard to state documents. The state library's role in collecting, organizing, preserving, and disseminating state documents and their contents is closely related to LISD's services both to state employees and to the citizens of the state through their local libraries.

Focus Group Discussion:

Six staff members took part in a focus group discussion held May 3, 2001. Their tenure with LISD varied from six months to seven years. They were asked how the department and their jobs had changed since the reorganization, the ways in which LISD was more or less effective than before the reorganization, the areas in which progress had been made on the five goals, the goals that should be the top priority in the coming year, and their assessment of the challenges that remain.

Their comments:

More emphasis is being placed on client services than before and there's a real effort to promote LISD among state employees. As a part of the reorganization a second service desk that is staffed to provide reference and ILL service was created. That has added a new level of professional service to users of the department. There's a lot more emphasis on providing service electronically and communicating with state employees in that way. Almost all people got an increase in pay.

Before the reorganization the Library seemed to be stuck in a rut. The approach was "the information is here... come and get it." Several participants offered that the department had become more proactive. One person said "We had been more of a public library for state employees and for people who live in the immediate area." As an example, it was indicated that the library used to have many more books of literature and short stories (the Dewey classification 800s). Most of these books have been removed from the collection.

It was noted that the changing collection makes it nearly impossible to serve as a typical public library any more. However, while most participants felt that the shift from providing general reading materials to reference and research materials was appropriate,

several worried that the library will encounter problems keeping up with demand for information service if the new approach is really successful. One of the focus group participants said, "Reference, interlibrary loan (ILL), and current awareness services are all currently manageable, but the present load represents a drop in the bucket (compared to what we might be called upon to do)." Most agreed that if a significant percentage of state employees started to use the services, the library would be really stretched to keep up. It was also noted, however, that the State Legislature is usually unwilling to support potential demand and that the library is unlikely to get additional staff unless the actual demand materializes.

Some staff discomfort was expressed over the fact that many, if not most, of the people coming in still represent the general public (either people from the immediate neighborhood or state employees in search of general reading materials). Staff indicated that they're trying to de-emphasize these services. Focus group participants said that when people ask for popular reading titles or come in looking for general Internet services that they "try to nudge them toward using their local public library" for those purposes.

The library has experienced an increase in the use of state documents and of the resources in the foundation collection. The statistics also show an increase in the number of state employees coming in, but it was noted that "some of them are coming in for purposes not related to our mission." Some outreach efforts to advertise library services to state employees have been successful, but in some cases the state employees who come in as a result are still using the facility like a public library.

Most agreed that the stickiest issue has been restricting the use of the PACs/Internet computers. One person noted that, "It's a fine line because the public pays for the library and the computers with Internet access are there... Where do you draw the line?"

One relatively new employee expressed a concern that "everything seems to be going electronic, electronic, electronic." The staff member worried that eventually one person would be able to do it all and that staff would be cut. However, the others in the group disagreed. One said, "I do a lot of tutorials and coaching state employees in the resources we've got. The more state employees have access to, the more training we'll be doing!" Others chimed in repeating the concern expressed earlier that the problem was more likely to be too much demand.

One other staff member expressed a related concern saying, "Some people put too much emphasis on electronic resources. There is a tendency for people to think that they can get everything electronically at their desktop. Sometimes there are better print alternatives. I want them to have some reasons to step into our building." The person went on to say, "We could be too successful in convincing people that they don't have to come in."

What progress is being made on goals?

Goal 1:

An easy to use web interface provides clients with reliable access to pertinent, up-to-date resources of the state library and other agency libraries, including, books, journals, state documents, federal documents, reference databases, and specialty online journals and bibliographic databases.

Most in the group believed that real progress had been made toward achieving this goal. Participants in the focus group were asked to grade progress and all but one provided a very positive assessment.

Comments on this goal included:

LISD now has a web site. We now have about 40-50 pages with real information, not just links to other stuff. They include shipping lists, current journals page, links to their electronic equivalents, where they can be found on INFOTRAC, Ebsco Host, etc.

A lot of people didn't know that there are other departmental libraries. We've given them more visibility as well.

There are pages that emphasize state employee services... literature searches, ILL, suggestions. The rest is open to the public.

There was a flyer that went to all 13,000 state employees and a follow-up to new employees, promoting LISD services.

We're acquiring more online journals and making sure that our journal holdings are in good shape (may go on a shared system).

When we get new materials, a note goes out to people. These are things that weren't happening before.

The web pages are pointed more at state agencies, but the holdings are available to other libraries as well. On the web page are e-mail links that say who to contact.

Publications are getting requests and questions electronically. The web page directs people to the right person. It appears that state publications are being used more, but it's hard to say. The statistics weren't a big thing before but they are now... we're having some difficulty documenting our progress. (Can't really document what usage was before.)

We're working hard to clean up the catalog before we migrate and we're finding a lot of things to clean up. We'll be a part of the Western Montana Shared Catalog. We're also integrating state documents into the general collection.

Grades on progress: (A = 5, B = 4, C = 3, D = 2, F = 1)
5,5,4,4,5,2 - mean = 4.17, median = 4.50

Goal 2:

In 2002, state employees throughout Montana are familiar with and value the services of the Library and Information Services Department.

Focus group participants offered evidence that efforts to inform state employees of the services offered by LISD were working; however, it was also recognized that the library is currently used by a very small percentage of state employees. The grades given by staff on this goal reflects this fact. Concern was also expressed that more definition of the role of LISD in serving public libraries was needed.

Following are some of the comments that were offered in discussing this goal:

State employees are becoming familiar with what we can do!

The technology consultants bring back stories of people in the public libraries using the information too.

Because of the outreach efforts we are getting requests from outside Helena: Fish and Wildlife and Public Health and Human Services from around the state.

There are lots of ILL requests coming from State Agencies

We get general phone calls from state employees asking where the library is located.

There really seems to be a caste system. It's state employees on top, then public libraries in the state, and then the general public. I'm concerned that the most loyal of the patron groups, the librarians around the state, have been de-emphasized and they're still loyal. We get a lot of calls from them and they continue to make use of our materials. I know we're moving away from serving them directly, but my concern is that many of those libraries are very small. We're still going to need to continue to help them.

I don't think that that's going to be the case. There has been a shift from providing backup collections to helping with reference and information services. We want them to become more independent, but they need a lot of handholding.

I'm seeing federal government employees coming in to use the document collections (both federal and state documents).

Grades on progress: (A = 5, B = 4, C = 3, D = 2, F = 1)
3,3,4,2,3,2 - mean = 2.83, median = 3.00

Goal 3:

Urgent requests receive priority attention and are handled within required timeframes.

Staff members believed that LISD had in the past and continues to do an excellent job in this goal area. However, it was also apparent that the department is still experiencing some adjustment in regard to how decisions are made and how policies are developed. Nevertheless, participants graded the department highly on this goal.

Some representative comments include:

Urgent Requests have always been a priority. We try to satisfy those within the constraints of Interlibrary Loan. Only state employees can request ILL these days.

It isn't written down, but state employees are at the top of the list.

Turn around time on reference is very good.

Again, I worry about the quality of service if we're successful in changing what we're doing. Our plate is pretty full and we're doing a good job at the moment.

In January, March and April this year the number of reference transactions were all above 300. They used to be 200 per month.

If somebody comes into the building, they get priority service, even over phone calls from libraries. When it's a call from a library, I ask the person at the library if their patron is standing at the library desk and if she or he is, I try to deal with it like the person was standing at our desk.

Participants in the focus group were asked another question in regard to this goal. The question was, "Do you think the workflow is more efficient now than before the reorganization?" Responses were as follows:

That depends on the time of the year. The fiscal year ends June 30th. Between January and June it's hairy because we're trying to purchase the new materials. We're trying to improve the acquisitions process, using the electronic methods more.

The current awareness program (table of contents or TOC) has gone from having two people involved to having six people involved--that seems inefficient. Part of

the inefficiency is that the program is a work in progress - used to just photocopy everything. We had a system in place that would do it, but the waters have been muddied a bit. We wanted to offer just TOC for those available electronically, but we're getting requests that aren't available electronically. Instead of a replacement service, we've got duplicated services. It has added some labor and complexity.

The old version of current awareness service had thirty subscribers. Out of those thirty we now have only seven. There have been no complaints from the others, but we need to address the photocopying and faxing issues, etc. It's manageable at this point but it probably isn't in the future for those that aren't available electronically.

I have another problem with efficiency. It used to be that three or four people made the decisions. Now just one person makes the decisions and if the decisions aren't made you sit in limbo. Decisions that are made one day are changed the next. This isn't a function of the reorganization. It seems like a lot of stuff gets studied into the ground... we reach consensus and nothing ever happens or happens months later.

The Internet Use policy is a case in point. We had a meeting several months ago, but we never had follow-up meetings; we never got a formal Internet Use Policy. So without the policy, what do you do when the public comes to play hearts on the computer?

There are things that have been discussed since I got here that haven't been resolved.

In the reorganization one person took on too much and they're not very good at following through. You don't have the authority to make the decision so you end up feeling inefficient.

Grades on progress: (A = 5, B = 4, C = 3, D = 2, F = 1)
5,5,5,4,5,5 - mean = 4.83, median = 5.00

Goal 4:

Librarians are readily available by telephone or at the Library and assist clients to define questions, use resources, and develop strategies for finding answers in unfamiliar topic areas.

Focus group participants believed that real progress had been made toward achieving this goal. The shift from providing popular materials to supporting state employees' reference and research needs was also apparent.

Comments regarding progress toward this goal include:

I don't know about progress, but I think that people get help when they come in and when they telephone.

I think that we've made progress.

People coming in used to be faced with just the circulation desk. Now there's the reference desk too and it's staffed at least 6 hours per day.

We all do outreach and promotion when we're on the desk.

I've noticed that the reference interviews are far more in depth than they used to be.

We're doing more research rather than the quick answer stuff.

Grades on progress: (A = 5, B = 4, C = 3, D = 2, F = 1)
4,5,5,4,4,5 - mean = 4.50, median = 4.50

Goal 5:

State employees use the department's web-site and their email software to register, request loans, photocopies, current awareness services, literature searches, and document retrieval, and to schedule training or consulting services.

Focus group participants believed that progress was being made toward achieving this goal but also felt that much work remains to be done. Most of the additional efforts suggested relate either to making state employees aware of the web-site and its resources or training state employees to use the resources effectively.

Comments and suggestions related to this goal include the following:

The pages on the LISD web-site where you can request literature search, ILL, make suggestions weren't available before. Progress has definitely been made. The web-site isn't being used a lot yet, but those who know about it are using it. The form prompts them for the information that we need to fill the request. I don't think that state employees are fully aware.

We need to do more bibliographic instruction in house for state employees.

LDD does that for state librarians; they have traveling laptops so they can set up a training lab. We could pull in people from the agencies if we had a training lab.

We could build it into new State employee orientation.

I don't know if the state employees don't know about it, or know about it and just don't use it.

That brings up another concern: with efficiencies will come numbers that we won't be able to cope with. (Concern about being overwhelmed)

A person from Billings sends a lot of interlibrary loan (ILL) requests. He sent 15 requests the first day. (There may need to be limits on the number of ILLs that can be requested at once.) There are a lot of people who do contract work for the state; we did limit them a bit, but there's no limitation on actual state employees yet.

Grades on progress: (A = 5, B = 4, C = 3, D = 2, F = 1)
3,5,2,3,3,3 - mean = 3.17, median 3.00

Priorities for the future:

Focus group participants were asked to identify priorities for the future. Most felt that the current goals were worthy ones and it was generally agreed that Goals 2 and 5 need the most attention. This assessment aligns closely with the grades staff gave their performance on the various goals. Furthermore, raising awareness of the LISD's services through outreach efforts was seen as a key to overall success.

However, participants made a case for continued work on each of the five goals. Comments such as "It all goes hand-in-hand," and "it all ties together" were typical. Maintaining high quality service in the face of increased use was also a recurring topic. "We need to develop coping mechanisms to maintain quality of service. We do a pretty good job now but staff size is limited. We would need creative ways to make staff available on the floor."

When asked if there should be any new goals or alternate approaches to the current goals, the conversation turned again to better defining LISD's role in regard to service to public libraries and to the general public. "We need to include those in the goals too, or at least clarify how the goals apply to these other populations."

All agreed that communicating a change in the focus of service is difficult. State employees and the general public continue to approach the library as if it was a public library. One participant summed up the challenge by saying, "It comes down to educating one person at a time."

It was pointed out that the reorganization only started in March 2000 and that this is a relatively short period of time to achieve a wholesale change of user attitudes. Another person suggested that the goals needed to be fleshed out more, especially as they relate to user groups other than state employees. Yet another person indicated that objectives with specific target dates for achievement need to be added. "Right now I think more attention

is being paid to lofty goals than to the nitty-gritty processes of providing services." Finally, one staff member suggested that the move to the new shared automation system might require either a separate goal or a modification of one of the current goals.

Interviews

What follows are some key points and comments from the individuals interviewed.

The current goals reflect the steps that were viewed as necessary to make the LISD "the first place state employees go for information." They are a combination of enhancing the library's electronic presence and making information services available to state employees where they are (as opposed to just in the library itself). We're beyond (the upheaval of reorganization) now and are moving forward. The new team is working well together. The log of reference activity shows that more people are using the library and that there is greater variety in the types of questions that are being asked. LISD has become more effective in that it's more focused in what it does. In better defining the service populations we have been able to focus the collections better. We are making an effort to learn more about our patrons' needs, their vocabularies, etc. That information has made us better in conducting reference interviews.

LISD has made significant progress on goal one. We have a web-site now; there was nothing before. The LISD catalog is now available on the web-site. Some online databases have been added and more are planned. Collection development has been targeted. The 170 state employees who responded to the November survey are our expanded focus group and we're sending them notices and updates. LISD has been able to provide links to other agency libraries and to list their major holdings online. LISD is maintaining a log of journals being used; we're placing a heavy emphasis now on keeping data to inform future decisions.

The efforts to reach librarians has been more successful than those with state employees. Wired Montana has provided an easy method for communicating with librarians in the State. Acquisitions of professional materials for librarians are selected and purchased by LISD and are announced to the library community by LDD using a variety of methods including MLA's Wired-Montana listserv.

One missing component has been the lack of a formal marketing plan. LISD continues to be the provider of back-up reference service and of professional materials for the state's librarians. In the past the State Library was seen as a primary reference provider. LISD is now becoming the library of last resort for them instead. The goal is to get the libraries to help each other more via Wired Montana. The next step is providing librarians with more training on reference searching strategies. However, "changing the direction of the ship is hard!" The change from acting as a public library to acting like a "special" library involves a rethinking of processes and a better understanding of the context within which state employees are working. Several efficiencies that have been implemented including maintaining logs of activities using a database program and the incorporation of time frames into goals.

LISD receives less than half of the publications created by other state agencies even though the library is supposed to receive copies. Agency people need to be made aware of their responsibility in this regard

Future priorities should be training users and developing the web-site to become a more effective and widely used tool. State publications are a major challenge and opportunity. The acquisitions process needs to be more effective, including electronic as well as print publications. The physical space of the library needs to be made easier to use and we need a computer lab so staff can do tutorials with agency personnel. We also need to bring NRIS into this more.

A great deal of time and effort has recently gone into improving the quality of the library's bibliographic records in preparation for participation in the consortium. The state library's participation in the consortium sets a positive example. "It's hard to encourage other libraries to join a shared catalog if the state library doesn't participate."

LISD's change in focus toward serving the information needs of state employees has been an appropriate one. The most appropriate roles for LISD in serving public libraries are as a professional library (library science collection, staff development materials, resources for library trustees), and as a provider of the information contained in state documents. LISD also has an important role in identifying quality web-sites and making these available to libraries by providing links on the state library's web-site.

The department deserves an "A" for the effort and a "B" for the actual accomplishments as far as being known and recognized by the average state employee as a valuable information resource. Although several of the libraries (Historical and Law) are large enough to function independently, a number of the departmental libraries are small operations that either do or could look to the LISD for leadership. There should be a new goal dealing with nurturing and growing the role of LISD as the "leader library."

Two LISD users were interviewed. Both use LISD for ILL and prefer having access to things electronically, "to the desktop." One uses both NRIS and LISD resources extensively, the other often goes to the web-sites of other states to find what she needs (in her particular subject areas). Since the LISD reorganization there are more databases available online, but using some of the services is still a mystery.

The LISD staff is pretty helpful, but limited in numbers. "We need librarians to do searches for us, but usually they just tell me to do the search myself. We need a partner at the State Library finding stuff for us (anticipating needs) and letting us know when something appears. We'd like to think that the State Library 'cares' and could be part of our team." She likes e-mail communication—doesn't like having to take the time to go to the library. LISD has made some progress but "they haven't gotten there yet." "They're still stuck in developing the system. Why should I have to make out a white card for every request; why not just request online? Paper cards moving in the state mail are REALLY slow."

The Library could help with suggestions and materials to make things happen in Cabinet level initiatives. The Library could be much more—synthesize information and ship it out via email. With the State's e-mail system the Library should be able to provide access to information for state employees quickly. What the (earlier) focus group participants wanted the State Library to do is a big job and they weren't sure the State Library had the support it needed from the Governor and Legislature to do what we asked. The State Library needs to report to focus group participants about progress they've made. They were supposed to do that, but so far they haven't. "I don't really know where they're at... we do get announcements, but they should have open houses/tours for state employees."

There's been an increase in the number of useful electronic tools available through LISD. Delivery of information to the desktop is very important. Turnaround time in getting obscure resources from other libraries had improved. Information services took a big step forward when the holdings of the university libraries became available online. Awareness of LISD's services among state employees is "spotty;" most know that there is a State Library but few really understand its function.

LISD needs to do a better job of tying into the small departmental libraries in state government. The DEQ Library is an example: it's staffed by a part-time person who has very few resources other than "throwaways" from employees. At the same time, the DEQ librarian's strength is knowledge of what DEQ does and the terminology used within the field. LISD has a role to play in training departmental librarians and in coordinating the acquisition of resources in their subject areas. Departmental libraries should not be eliminated because of the unique connection that departmental librarians have to their subject area. Connecting the departmental libraries to an entity with greater staff and material resources would strengthen the level of service that departmental libraries could offer. The departmental librarian could act as the "translator/interpreter" working with the departmental staff as a personal librarian/information access trainer; LISD's role would be as the centralized resource and as the organizer of relevant information through its web presence.